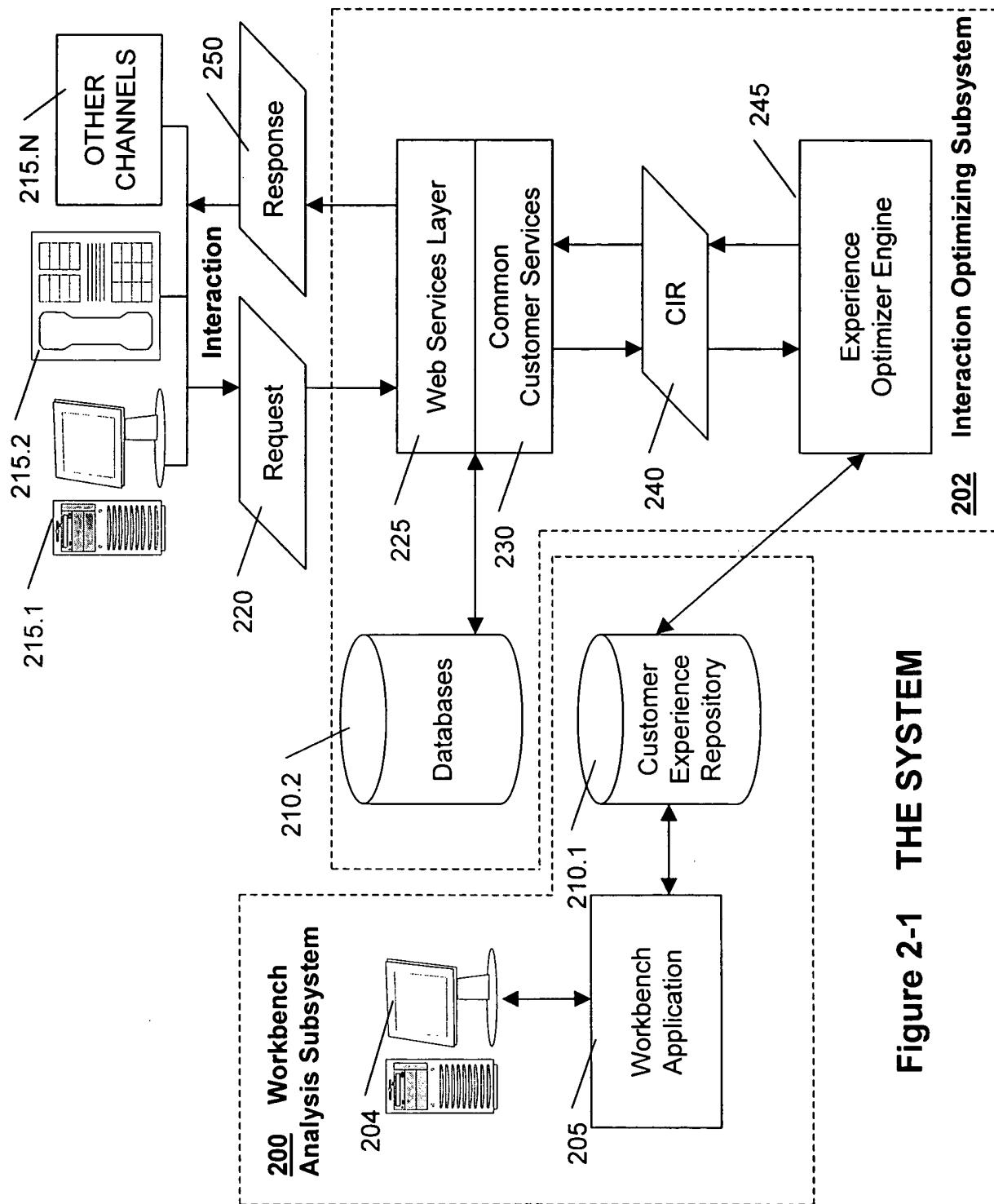
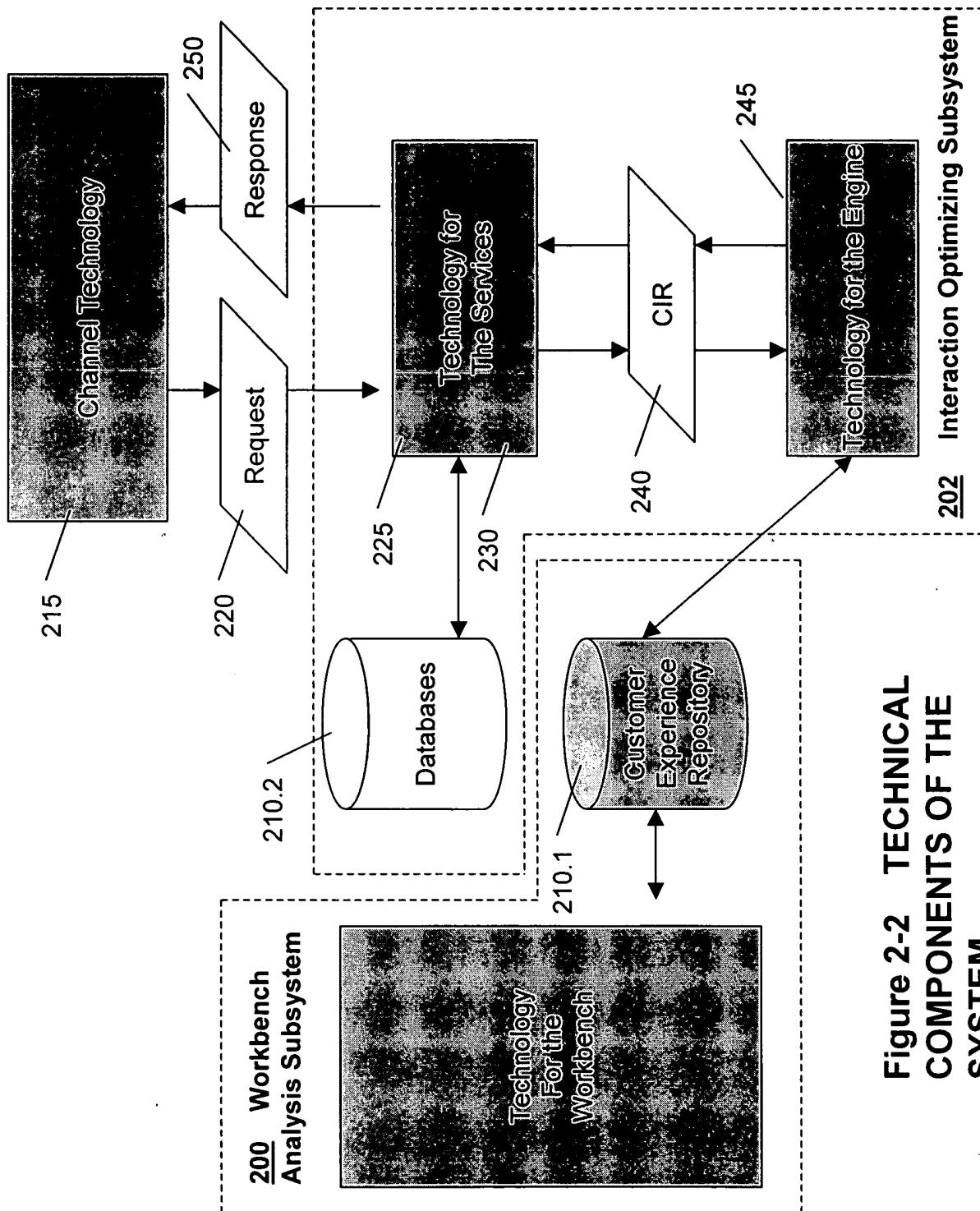


**Figure 1 THE METHODOLOGY**



**Figure 2-1 THE SYSTEM**



**Figure 2-2 TECHNICAL  
COMPONENTS OF THE  
SYSTEM**

**202 Interaction Optimizing Subsystem**

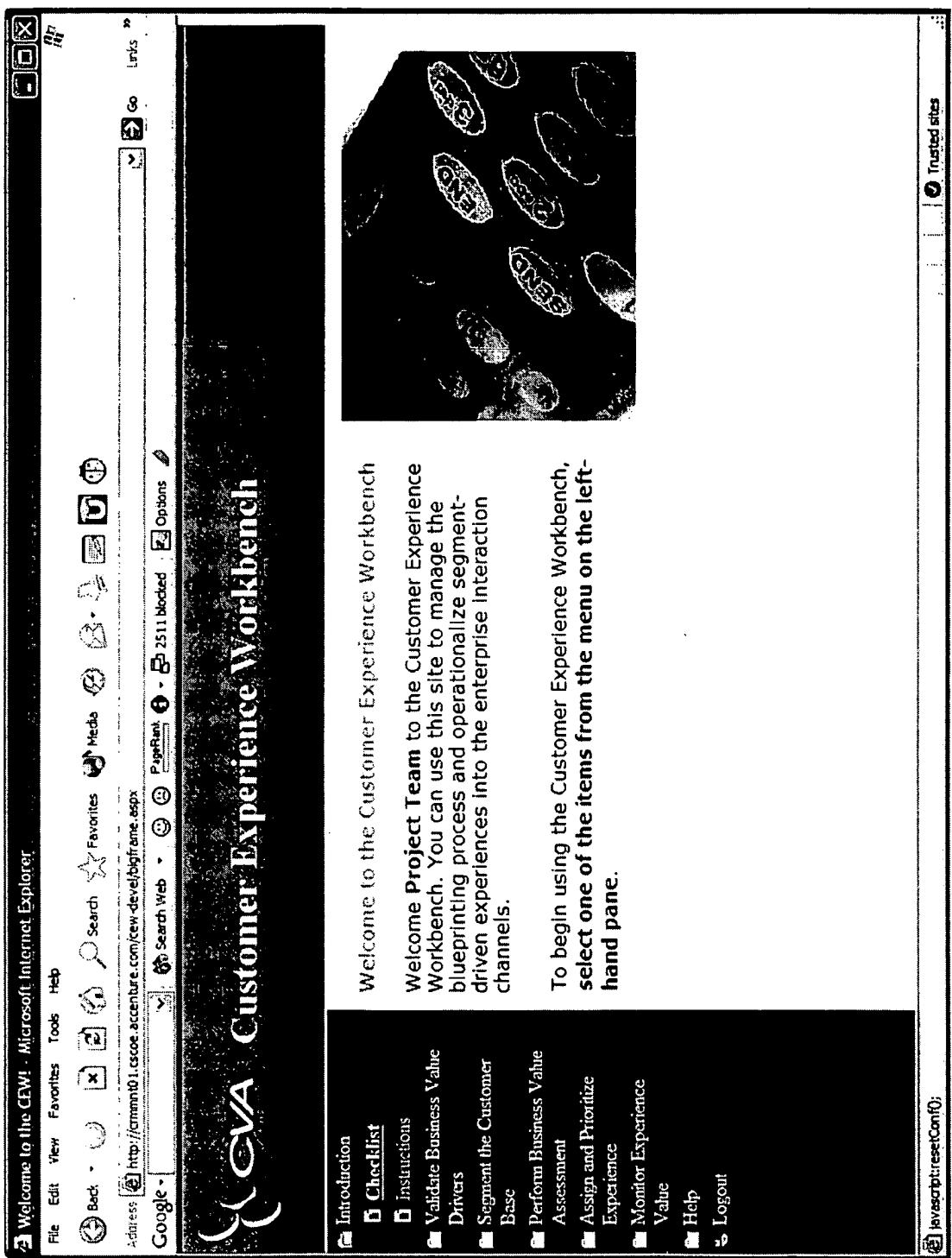
**202**

**Interaction Optimizing Subsystem**

## 240 Customer Interaction Record (“CIR”)

<u>242</u> Batch Data	<u>244</u> CEP	Trigger Data	Overriding Data	Account	Segment	Household	Address	Contact	Customer
		Other		Treatment A	Treatment B	Treatment N		Contact	Event Data

Figure 2-3 CIR FORMAT



**Figure 3-1**

3 Welcome to the CEW! - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back × Stop × Refresh × Favorites × Favorites × Media × Options ×

Address: http://cmmt01.0sce.accenture.com/cew/dev/bigtame.aspx

Google. Search web × PageRank × 2511 blocked × Options ×

Customer Experience Workbench

Location: Introduction > Checklist

**VALIDATE BUSINESS VALUE DRIVERS**

3210

Validate the business value drivers

3220

Define Key Performance Indicators

3230

Define Operational Constraints

**SEGMENT THE CUSTOMER BASE**

View Segmentation

Evaluate Sub-Segment Opportunities

**PERFORM BUSINESS VALUE ASSESSMENT**

Define Interaction Scenarios

Capture Current Channel Volumes

Capture Current Experiences

Optimize Segment Strategy

Model Value Opportunity

**ASSIGN AND PRIORITIZE EXPERIENCES**

Execute Blueprint Process

Trusted sites

**Figure 3-2**

**Figure 3-3**

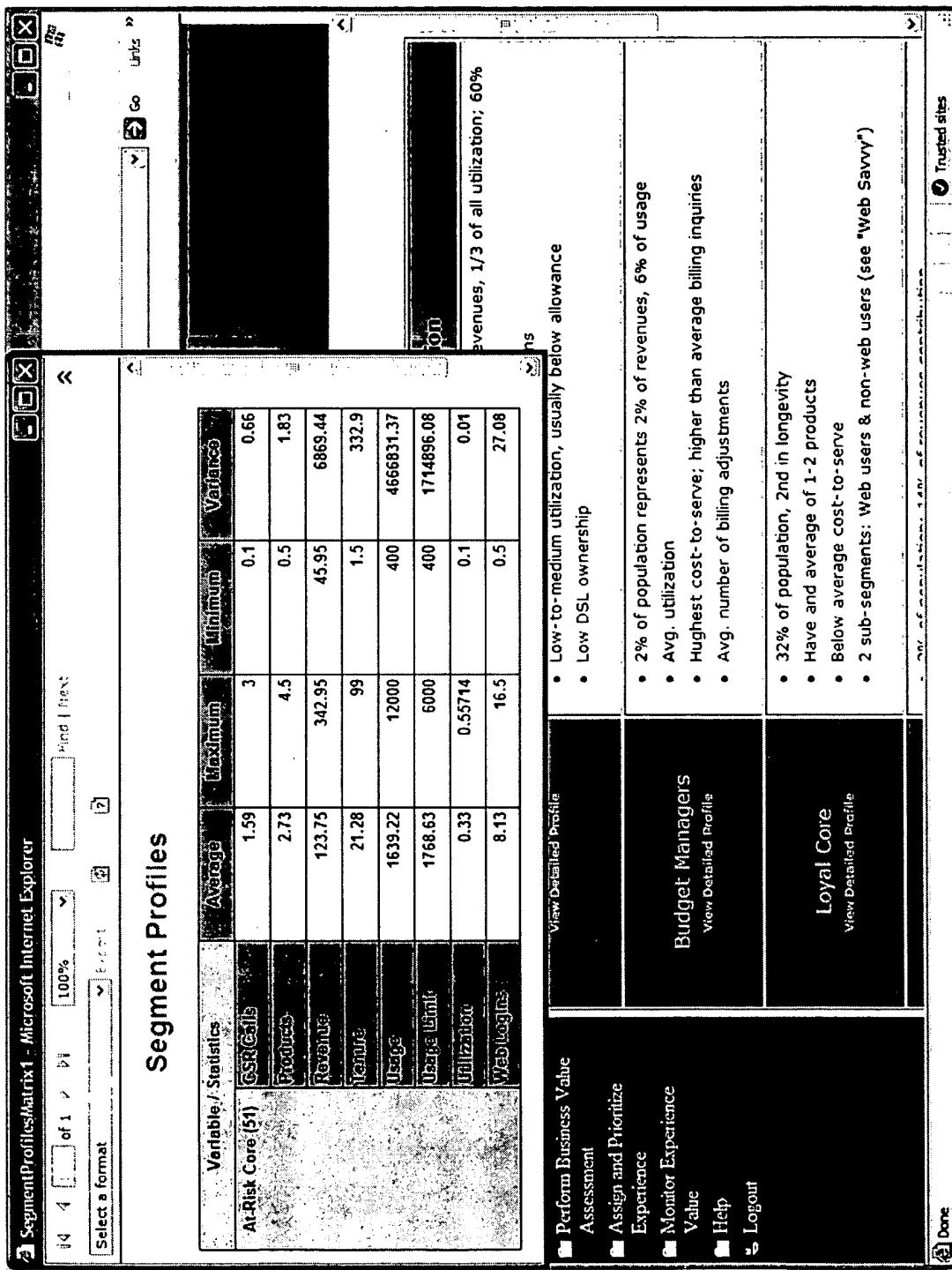


Figure 3-4

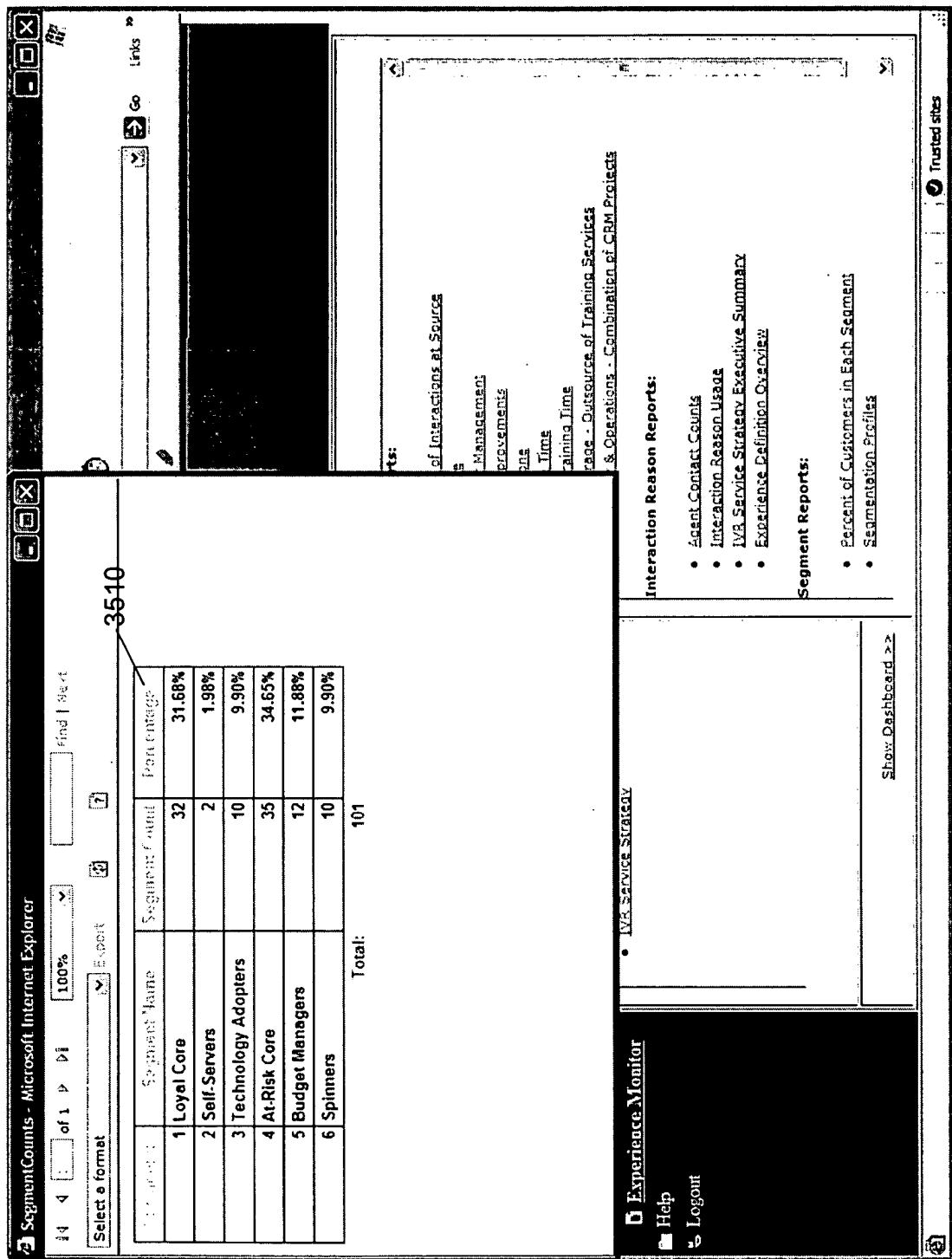


Figure 3-5

Segments - Microsoft Internet Explorer

4 of 1 100% Print | Back | Stop | Refresh | Select a format: Export | 2

Segment Identifier: 3610 Sub Seg. Name: Establishment Date

Segment Identifier	Sub Seg. Name	Establishment Date
107602199956	North	Sep 27, 1998
119154654604	Not Assigned	Dec 27, 2001
151880630823	Not Assigned	Jun 12, 2001
158724460667	North	Jun 13, 2002
173514759393	East	Dec 31, 1998
186439457528	North	Oct 10, 1998
193875038613	North	Jan 31, 1999
226933596638	Not Assigned	Jan 22, 2003
231504490402	East	Jul 30, 1998
233527785013	North	Aug 29, 2001
248768399985	Not Assigned	Nov 23, 2001
252881172688	North	May 27, 2002
278869278029	Not Assigned	Jul 09, 2001
279517534110	Not Assigned	Jan 22, 1999
280925570191	North	Jul 13, 1999

Interaction Reason Reports:  Experience Monitor  IVR Service Strategy  Help  Logout

Segment Reports:  Segment Contact Counts  Interaction Reason Usage  IVR Service Strategy Executive Summary  Experience Definition Overview  Percent of Customers in Each Segment  Segmentation Profiles

Show Dashboard >2 Trusted sites

Figure 3-6

Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://ammmit01.csce.acesne.com/cew/develop/gbname.aspx>

Google

Back Search Favorites Media Options

PageRank 2511 blocked Options

Links Go

CEWA Customer Experience Workbench

Welcome to the CEW! Microsoft Internet Explorer

Segmentation Subsegment Model Wizard

Should I subsegment? [Click here](#) for a guide to subsegmenting.

Segment Profile: Local Core

Revenue	3 Month Averages	Plans	
Usage	CSR Calls	Local	National
\$171.39	2000	0.59	7.5
			[AERH20, LAXND1, LBGER40, LGFGR50, NODHES2]

Create Subsegment

Subsegment Name:

Segment Total: 32

Current Subsegments:  East  to    
 North  to

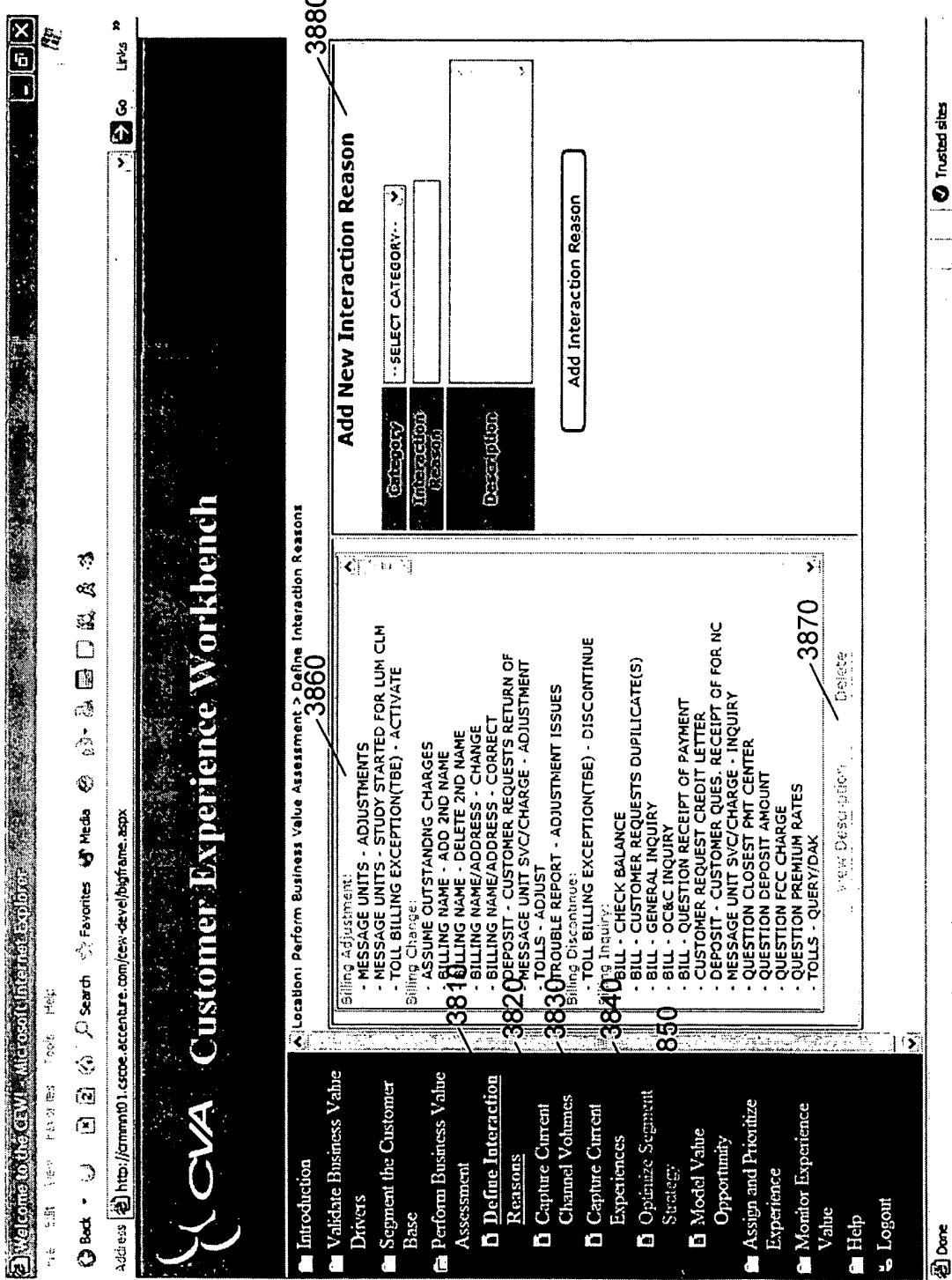
3 Month Revenue:     
3 Month Usage:     
3 Month CSR Calls:     
3 Month Self Service:     
Local Plan:    
National Plan:

Done Trusted sites

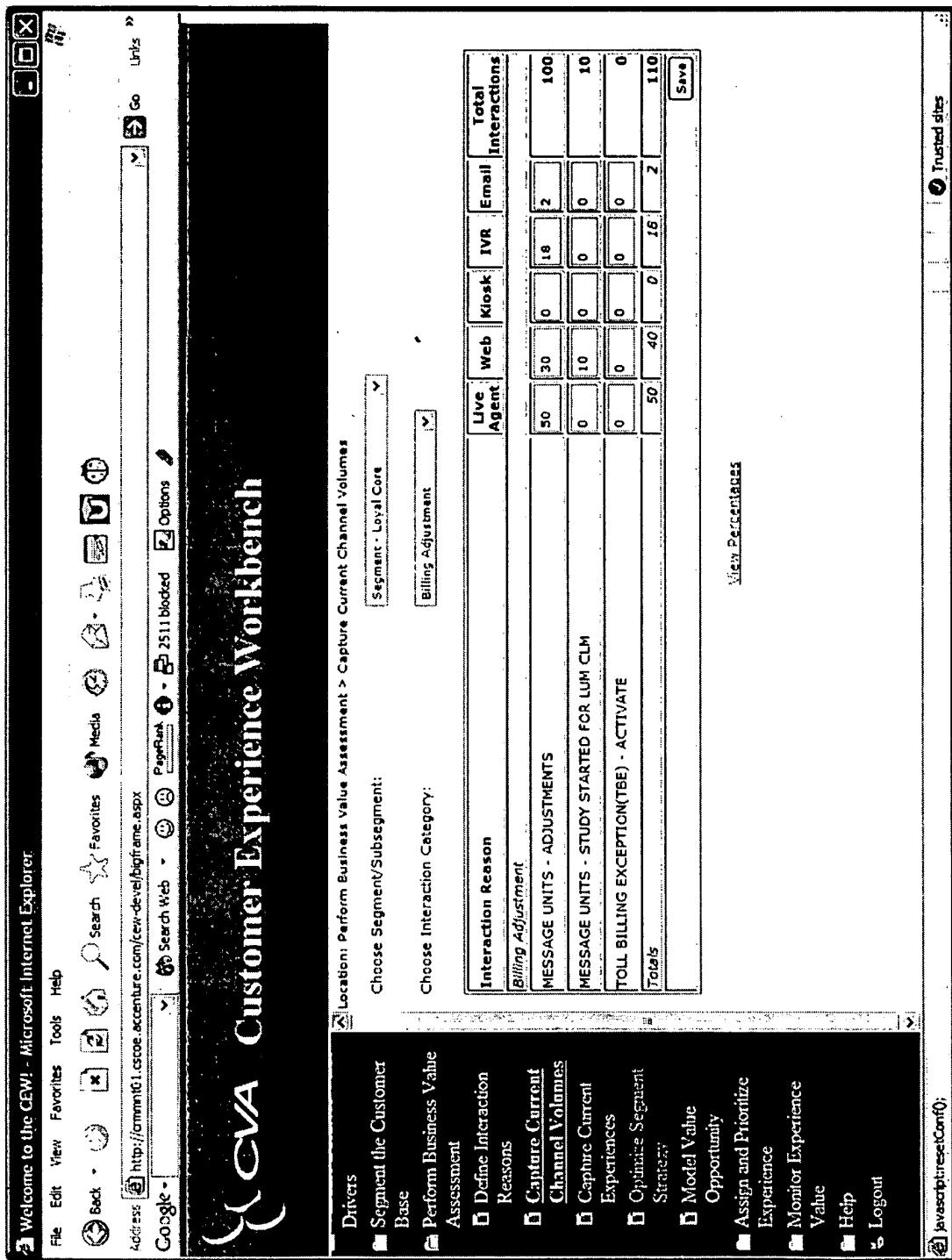
Introduction

- Validate Business Value Drivers
- Segment the Customer Base
- View Segmentation
- Evaluate Sub-Segment Opportunities
- Perform Business Value Assessment
- Assign and Prioritize Experience
- Monitor Experience Value
- Help
- Logout

**Figure 3-7**



**Figure 3-8**



**Figure 3-9**

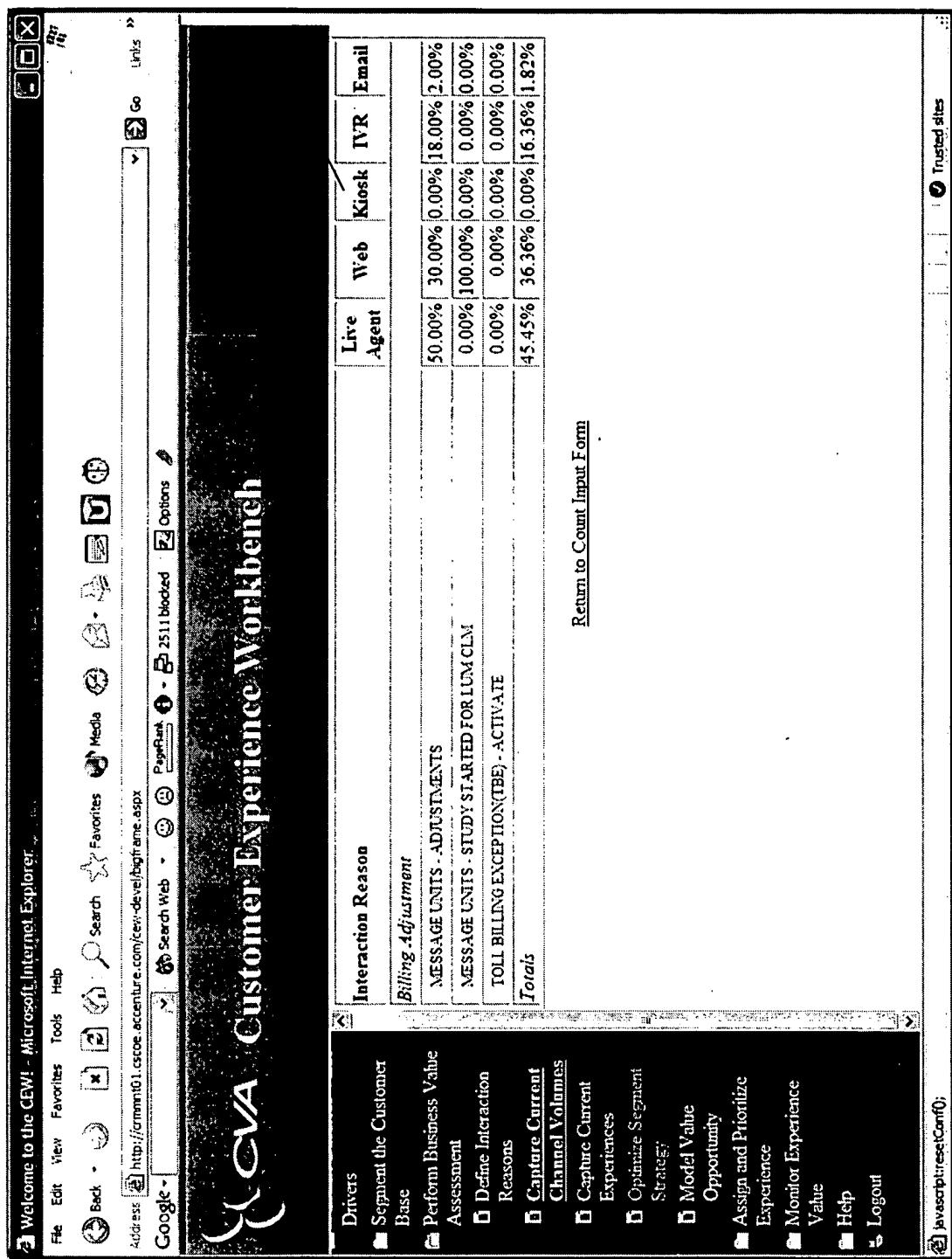


Figure 3-10

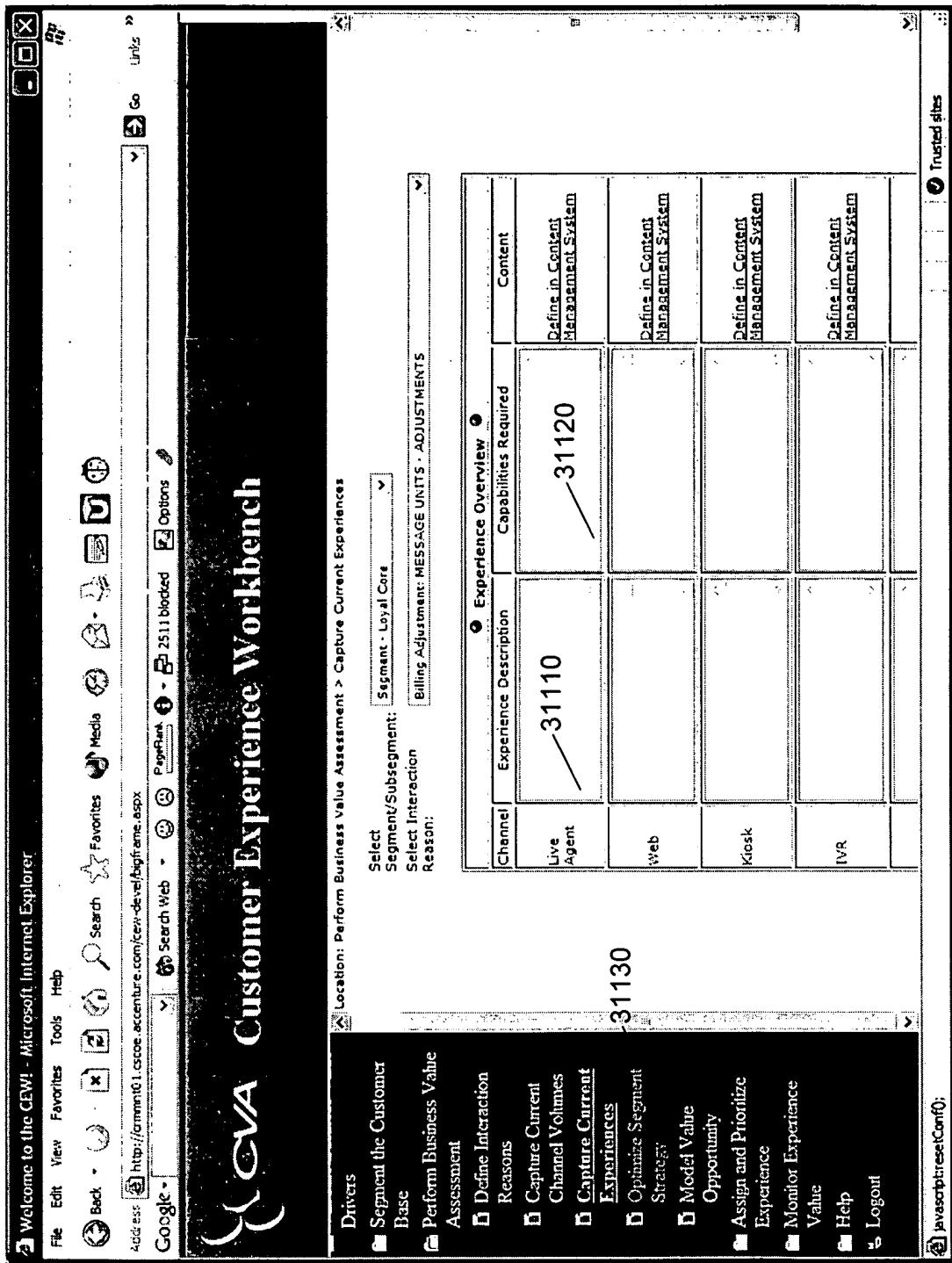


Figure 3-11

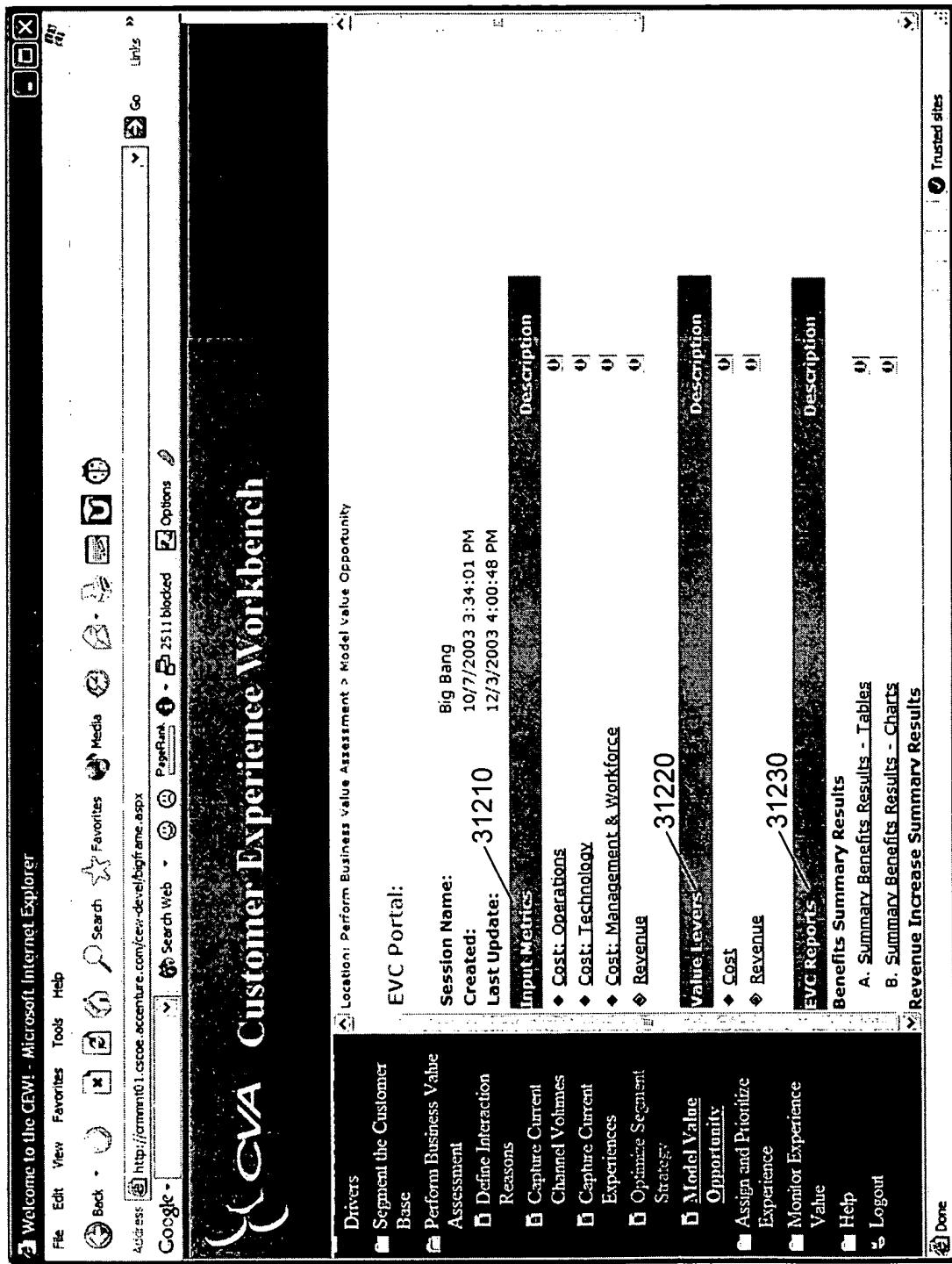
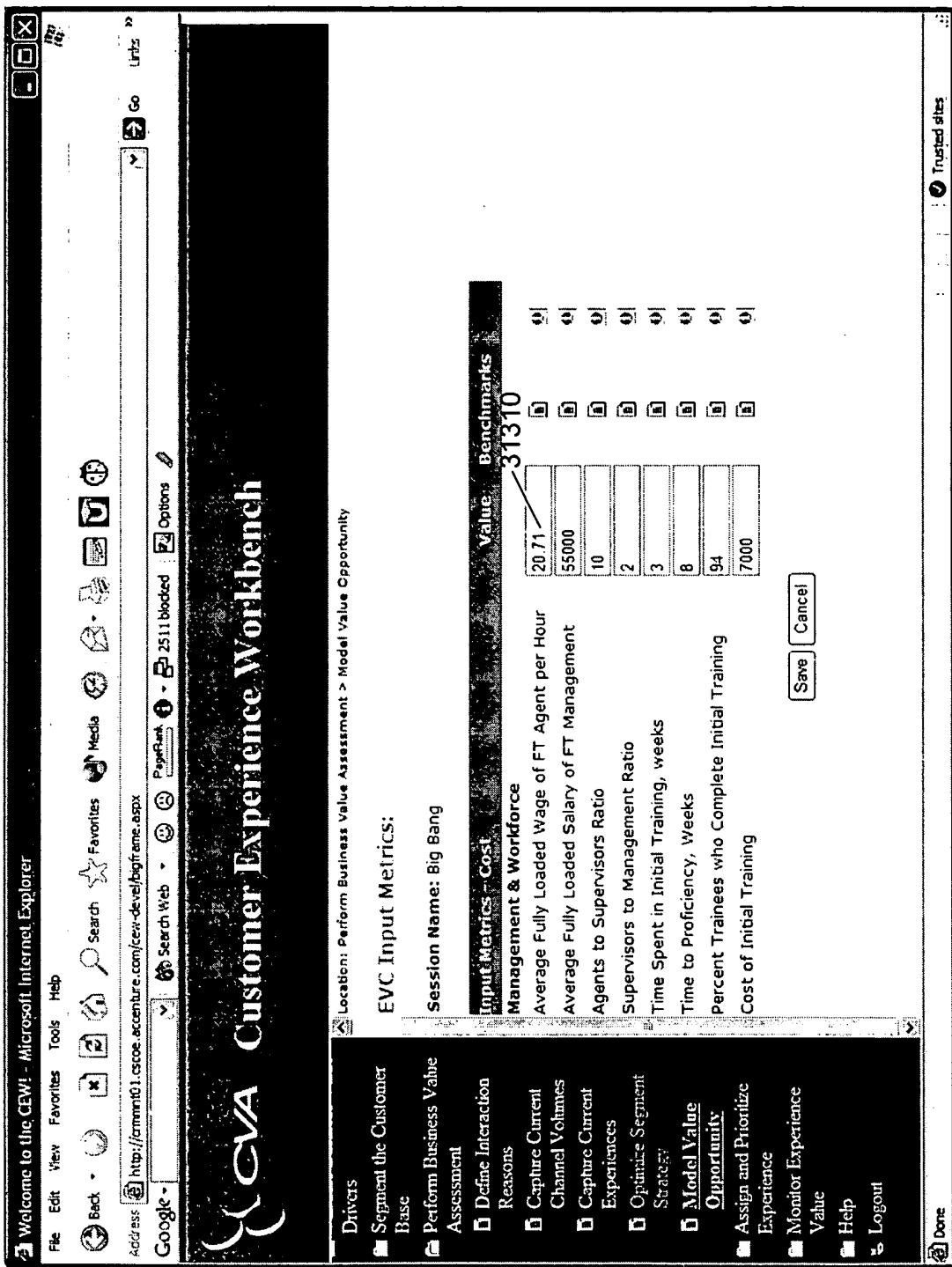


Figure 3-12



**Figure 3-13**

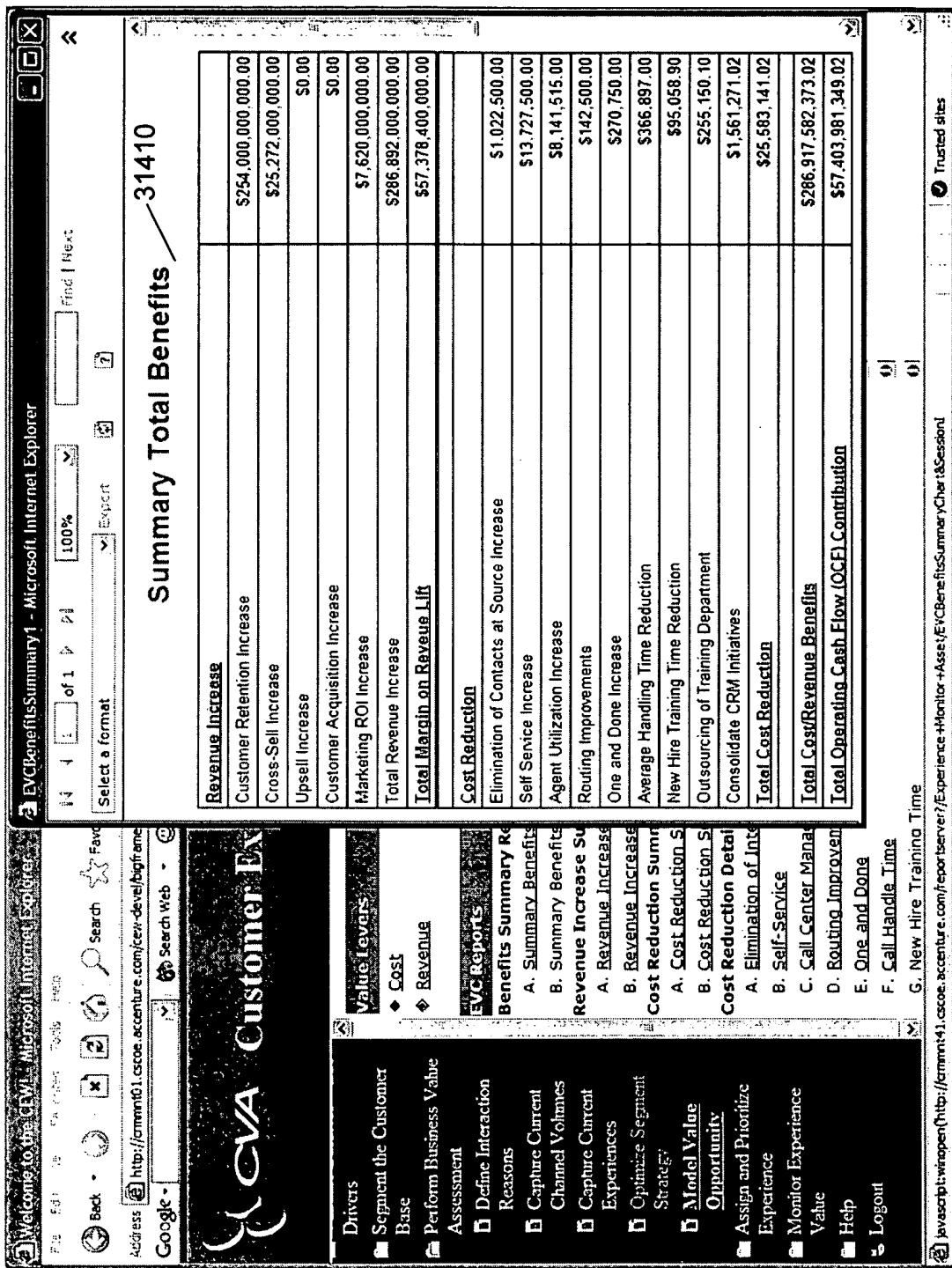
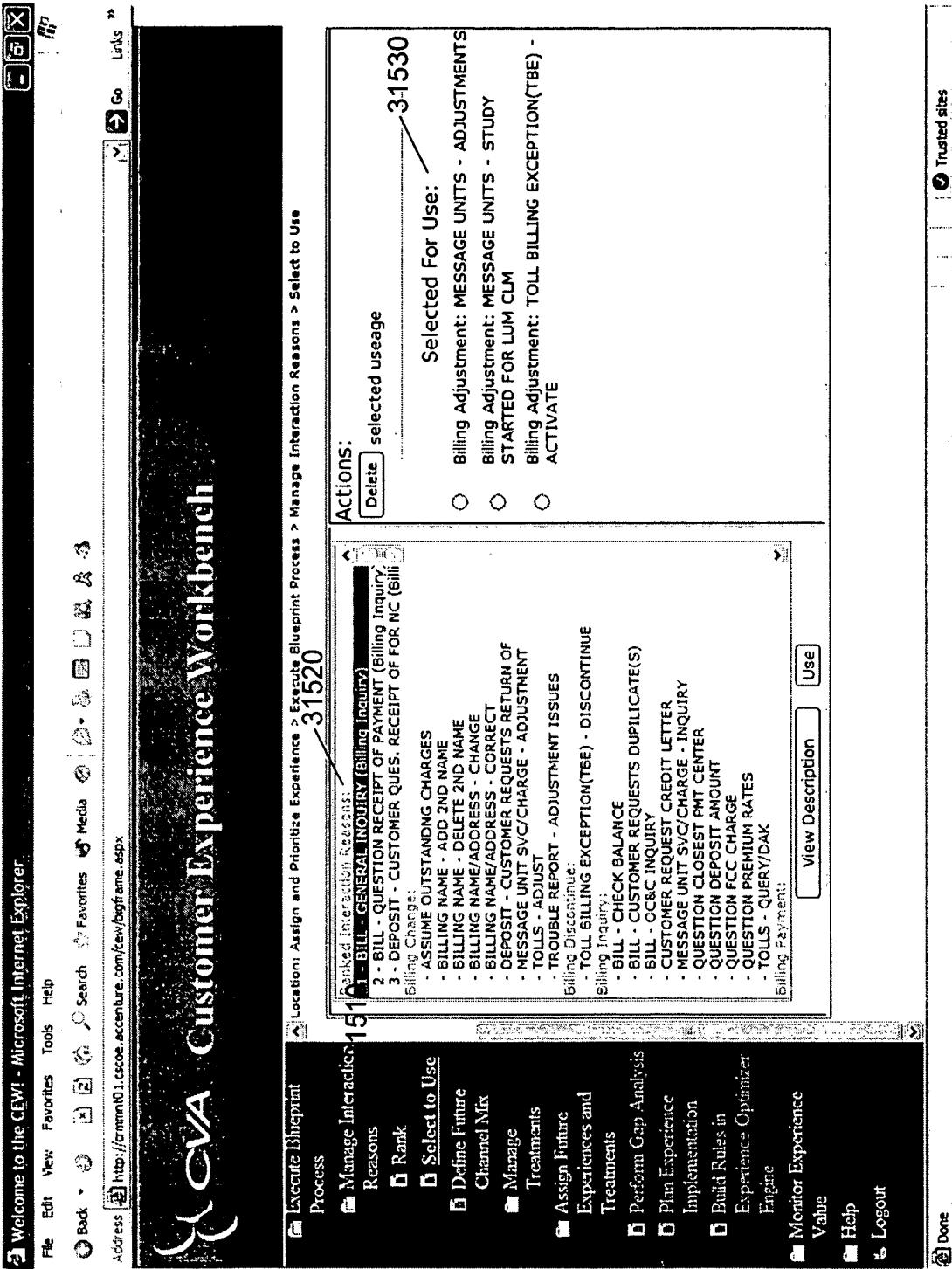


Figure 3-14



**Figure 3-15**

Figure 3-16 shows a screenshot of a Microsoft Internet Explorer browser window. The address bar shows the URL: <http://ammon1.csce.aceventure.com/csw-developerframe.aspx>. The page content is titled "Customer Experience Workbench" and displays a navigation menu on the left with the following items:

- Execute Blueprint Process
- Manage Interaction Reasons
- Define Future Channel Mix** (This item is selected, indicated by a checked checkbox)
- Manage Treatments
- Assign Future Experiences and Treatments
- Perform Gap Analysis
- Plan Experience Implementation
- Build Rules in Experience Optimizer Engine
- Monitor Experience Value
- Help
- Logout

The main content area shows a table titled "Interaction Reason" with the following data:

	Live Agent	Web	Kiosk	IVR	Email
Future	5%	90%	0%	0%	5%
Current	0.00%	100.00%	0.00%	0.00%	0.00%
Future	5%	90%	0%	5%	0%
Current	0.00%	0.00%	0.00%	100.00%	0.00%
Future	0%	80%	0%	20%	0%
Current	0.00%	0.00%	0.00%	0.00%	0.00%
Future	15%	40%	0%	10%	5%
Current	50.00%	30.00%	0.00%	18.00%	2.00%

A "Save" button is located at the bottom right of the table. The status bar at the bottom of the browser window shows the URL: <http://ammon1.csce.aceventure.com/csw-developerframe.aspx?resetConf0>.

**Figure 3-16**

Welcome to the GEM - The Grid Experience Edition

Back

Address: <http://admin01.128.0.254.aculture.com/cxw-devel/bigframe.aspx>

Location: Assign and Prioritize Experience > Execute Blueprint Process > Manage Treatments > Define

31720

**Add New Treatment**

<b>Category</b>	<input type="text" value="SELECT CATEGORY..."/>
<b>SubCategory</b>	<input type="text" value="SELECT SUBCATEGORY..."/>
<b>Reason</b>	<input type="text" value="Electrical"/>
<b>Description</b>	<input type="text"/>
<b>Channel</b>	<input checked="" type="checkbox"/> Live Agent <input checked="" type="checkbox"/> Web <input checked="" type="checkbox"/> Kiosk <input checked="" type="checkbox"/> IVR <input checked="" type="checkbox"/> Email
<b>Add Treatment</b>	<input type="button" value="Add Treatment"/>
<b>View Description</b>	<input type="button" value="View Description"/>
<b>Modify Values</b>	<input type="button" value="Modify Values"/>
<b>Delete</b>	<input type="button" value="Delete"/>

**Assign and Prioritize Experience**

- Execute Blueprint Process**
- Manage Interaction Reasons**
- Define Future Channel Mix**
- Manage Treatments**
- Define**
- Rank**
- Select to Use**
- Assign Future Experiences and Treatments**
- Perform Gap Analysis**
- Plan Experience Implementation**
- Build Rules in Experience Optimizer Engine**
- Monitor Experience Value**

31710

**Done**

Trusted sites

Figure 3-17

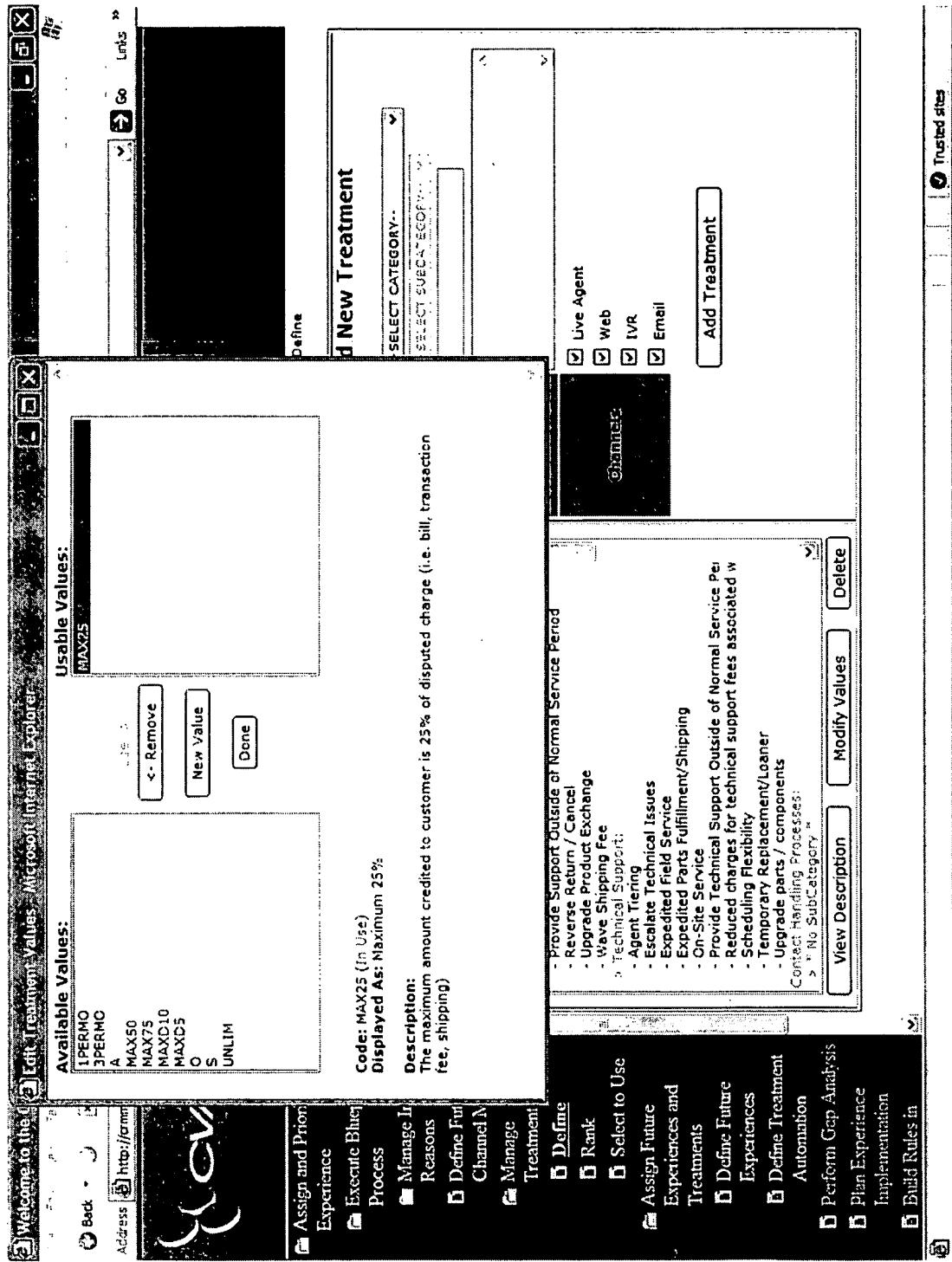


Figure 3-18

Actions: [Delete](#) [selected ranking](#) [Move](#) [selected ranking to #1](#)

**Top 10 Ranking:**

Rank	Process / Policy	Description
1	Business Processes & Policies: Credit Adjustments	Business Processes & Policies: Credit Adjustments
2	Business Processes & Policies: IVR Agent Availability	Business Processes & Policies: IVR Agent Availability
3	Business Processes & Policies: Expedited Field Service	Business Processes & Policies: Expedited Field Service
4	Business Processes & Policies: Expedited Parts Fulfillment/Shipping	Business Processes & Policies: Expedited Parts Fulfillment/Shipping
5	Business Processes & Policies: Escalate Order Technical Issues	Business Processes & Policies: Escalate Order Technical Issues
6	Business Processes & Policies: Expedite Order Fulfillment	Business Processes & Policies: Expedite Order Fulfillment
7	Business Processes & Policies: Expedited Field Service	Business Processes & Policies: Expedited Field Service
8	Business Processes & Policies: Expedited Parts Fulfillment/Shipping	Business Processes & Policies: Expedited Parts Fulfillment/Shipping
9	Business Processes & Policies: Free Add-ons	Business Processes & Policies: Free Add-ons
10	Business Processes & Policies: Free Upgrades	Business Processes & Policies: Free Upgrades
11	Business Processes & Policies: On-Site Service	Business Processes & Policies: On-Site Service
12	Business Processes & Policies: Pre-ordering	Business Processes & Policies: Pre-ordering
13	Business Processes & Policies: Price Protection	Business Processes & Policies: Price Protection
14	Business Processes & Policies: Provide Support Outside of Normal Hours	Business Processes & Policies: Provide Support Outside of Normal Hours
15	Business Processes & Policies: Provide Technical Support Outside of Normal Hours	Business Processes & Policies: Provide Technical Support Outside of Normal Hours
16	Business Processes & Policies: Reduced Charges for Technical Support	Business Processes & Policies: Reduced Charges for Technical Support
17	Business Processes & Policies: Reverse Return / Cancel Order	Business Processes & Policies: Reverse Return / Cancel Order
18	Business Processes & Policies: Scheduling Flexibility	Business Processes & Policies: Scheduling Flexibility
19	Business Processes & Policies: Temporary Replacement/Loaner	Business Processes & Policies: Temporary Replacement/Loaner
20	Business Processes & Policies: Upgrade parts / components	Business Processes & Policies: Upgrade parts / components
21	Business Processes & Policies: Upgrade Product Exchange	Business Processes & Policies: Upgrade Product Exchange
22	Business Processes & Policies: Waive Financing or Transaction Fee	Business Processes & Policies: Waive Shipping Fee
23	Contact Handling Processes: Agent Accessibility	Contact Handling Processes: Agent Accessibility
24	Contact Handling Processes: Agent Empowerment	Contact Handling Processes: Agent Empowerment
25	Contact Handling Processes: Channel Utilization Incentives	Contact Handling Processes: Channel Utilization Incentives
26	Contact Handling Processes: Own the Contact	Contact Handling Processes: Own the Contact
27	Contact Handling Processes: Personalization	Contact Handling Processes: Personalization

[Add](#)

Done

**Figure 3-19**

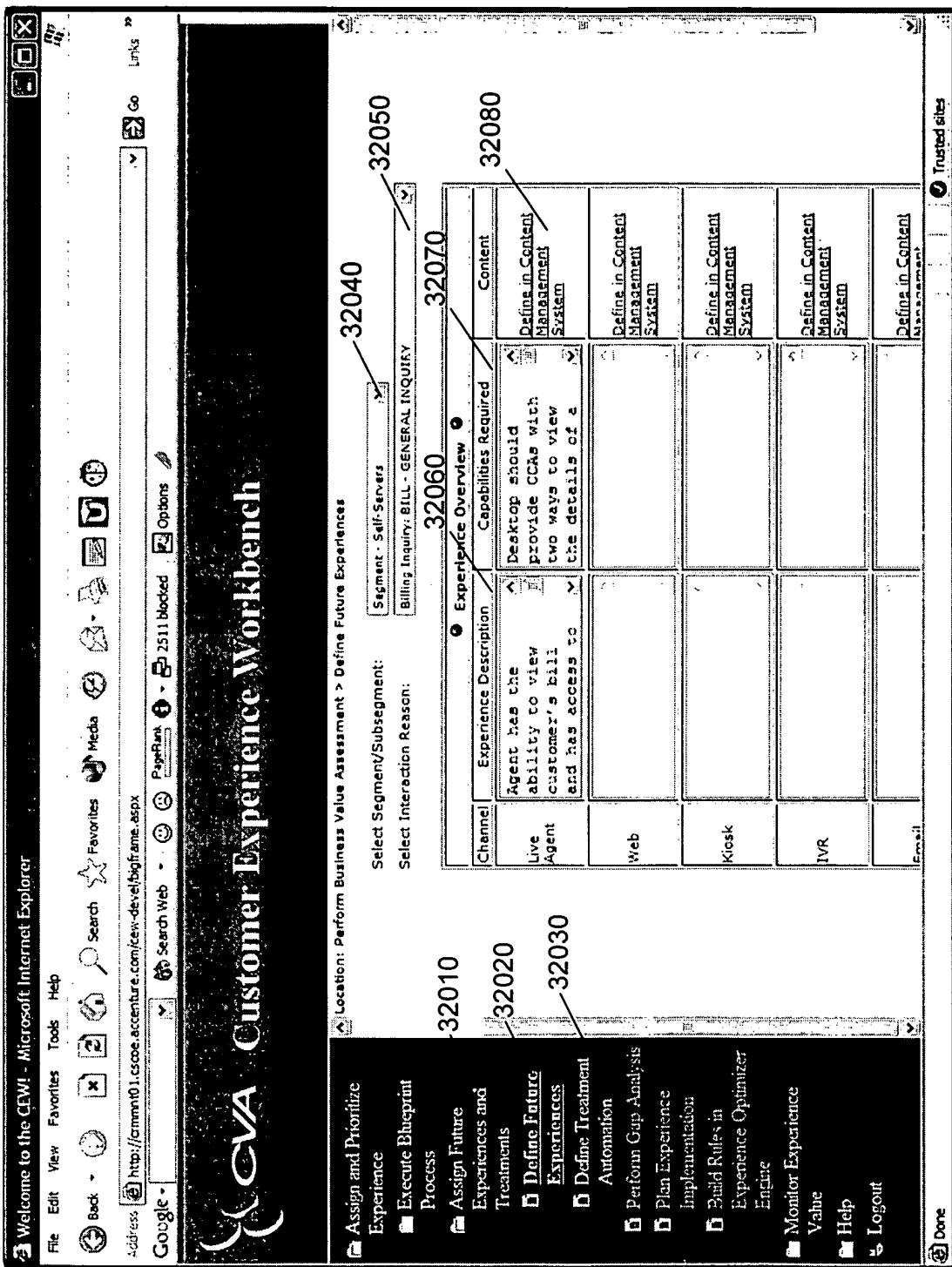


Figure 3-20

Figure 3-21 shows a screenshot of the Customer Experience Workbench (CXA) interface in Microsoft Internet Explorer. The title bar reads "Welcome to the CXW! - Microsoft Internet Explorer". The menu bar includes File, Edit, View, Favorites, Tools, Help, and a "Trusted sites" link. The toolbar includes Back, Forward, Stop, Refresh, Search, Favorites, Media, Help, and a Print icon.

The address bar shows the URL "http://cmn01.csce.adventure.com/cxw-developerframe.aspx". The status bar shows "PageRank 1" and "1997 blocked".

The main content area features a large "Customer Experience Workbench" logo and a navigation menu on the left:

- Assessment**
  - Assign and Prioritize Experience
  - Execute Blueprint Workshop
  - Assign Future Experiences and Treatments
  - Define Future Experiences
  - Define Treatment Automation
  - Perform Gap Analysis
  - Plan Experience Implementation
  - Build Rules in Experience Optimizer Engine
  - Monitor Experience Value
  - Help

The central area displays a "Treatment Automation" section with the following details:

- Location:** Assign and Prioritize Experience > Assign Future Experiences and Treatments > Define Treatment Automation
- Segment - Level Care:** 32110 (selected)
- Bill:** General Inquiry
- Choose Interaction Reason:** 321130
- Choose Channel:** All Channels (selected)
- Choose Treatment Category:** 321140
- 201 Categories:** (dropdown menu)
- Treatment Automation:** (radio button)
- Treatment Element:** Business Process & Platform Account Billing (selected)
- Channel?** (dropdown menu)
- Live Agent:** (checkbox)
- IVR:** (checkbox)
- Email:** (checkbox)
- None:** (checkbox)
- Details:** (checkbox)

Below the treatment element, there is a table showing treatment details:

321150	321170
Customer Experience Workbench	Customer Experience Workbench
IVR Agent Availability	IVR Agent Availability
Market Offer and Commitments	Market Offer and Commitments
Best Offer	Best Offer

A "Update Automation" button is located at the bottom of the treatment element section.

**Figure 3-21**

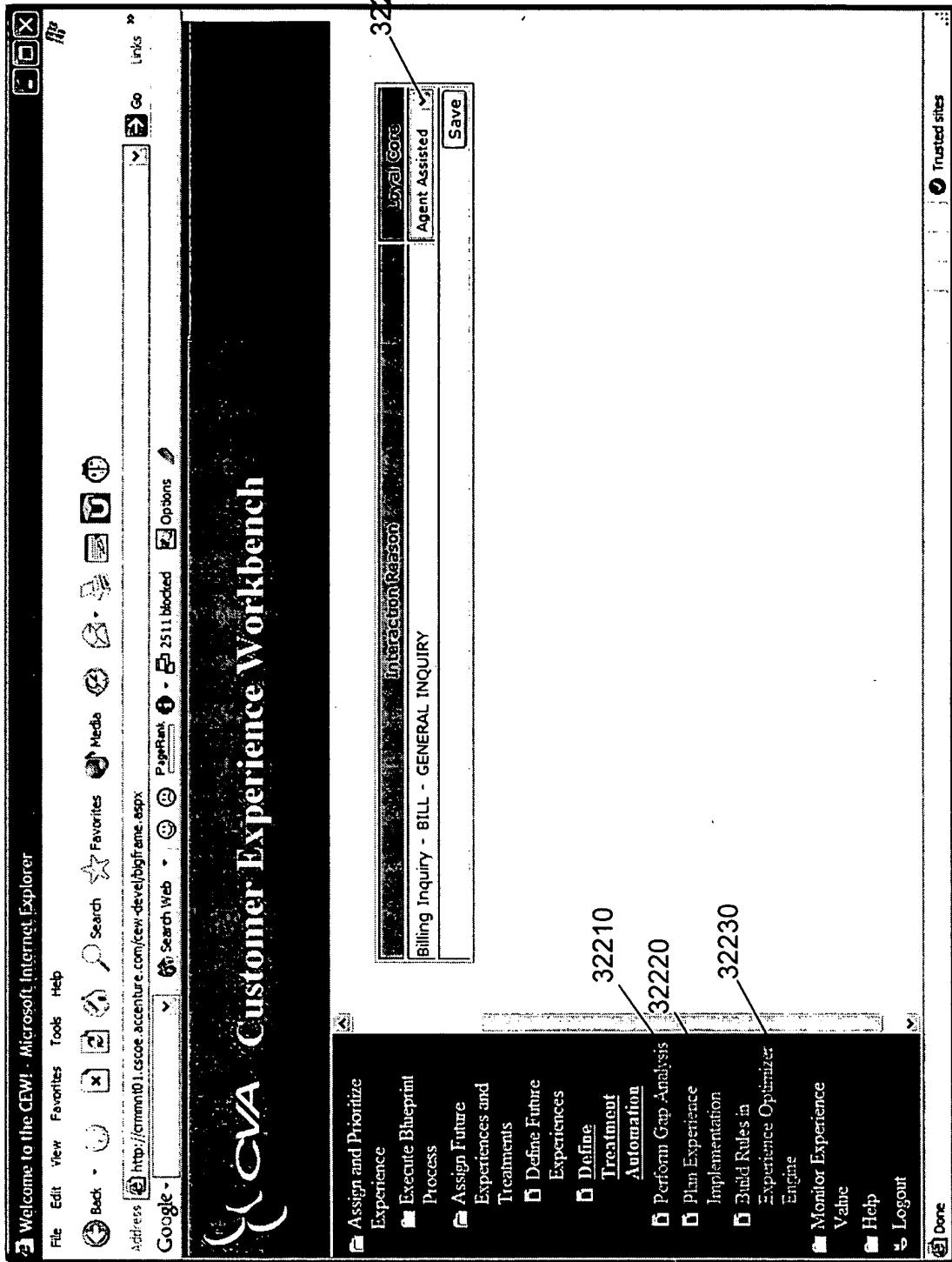


Figure 3-22

Welcome to the CEWI - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back •

Address  Go Links

Google

**Customer Experience Workbench**

Introduction

Validate Business Value Drivers

Segment the Customer Base

Perform Business Value Assessment

Assign and Prioritize Experience Value

Monitor Experience Value

Experience Monitor

Help

Logout

Dec 11, 2003 - Project Team

Favorites:

Screens

• Enterprise Value Calculator

Reports

• Segment Report

• IVR Service Strategy

The Dashboard:

14 4 1 of 1 100%

Segment	Value-Added Business	Business	Customer	Live Agent	100.00%	100.00%	Entire
Loyal Care	BILL - CHECK	Live Agent	20.00%	100.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Self-Server	BILL - CHECK BALANCE	Live Agent	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Loyal Care	BILL - GENERAL INQUIRY	Live Agent	5.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Self-Server	BILL - GENERAL INQUIRY	Live Agent	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Technology Adopters	BILL - GENERAL INQUIRY	Live Agent	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Self-Servers	BILL - GENERAL INQUIRY	NR	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Technology Adopters	LISTING - INQUIRY	Web	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
All-Risk Care	LISTING - INQUIRY	Web	0.00%	0.00%	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

Share All Available Reports

JavaScript:resetConf0();

**Figure 3-23**

### Treatment Category Examples

#### **Business Processes**

These treatments focus on business processes and policies that often are exception or specialized situations based on customer data.

### Treatment Element Examples

- Optimize Category Assortments
- Rationalize Space Allocation
- Tune Price Ladder
- Plan Item Adjacency
- Tailor Ad Vehicle/Messaging
- Optimize Promotion/Offer
- Refine Location Format/Layout
- Expedite Order Fulfillment
- Expedite Order Shipping/Delivery
- Extend Return / Exchange Timeframe
- Escalate Issues
- Reverse Return / Cancel
- Credit Adjustments
- Expedited Parts Fulfillment / Shipping
- On-Site Service

#### **Contact Handling**

These treatments focus on agent, channel, and routing decisions that may differ depending upon the customer data.

### Example Treatment Elements

- Channel Availability
- Agent Accessibility
- Priority Queuing and in-Store Service
- Own the Contact
- Voicemail Follow-up
- Route to Same Agent
- Segment Recognition
- Personalization
- Warm Transfers
- Surprise and Delights
- Proactive Follow-ups and Notifications
- Tailored Communication Styles
- Agent Empowerment
- Channel Utilization Incentives
- Self-Service Promotional Messages

#### **Marketing & Communications**

These treatments focus on types of offers or messages that should be delivered based on customer data.

### Example Treatment Elements

- Best Offer
- Segment Recognition Programs
- Product Configurations
- Product Bundling
- Cross-Sell Offers
- Cross-Sell Messaging
- Up-Sell Offers
- Up-Sell Messaging
- Promotion Messaging
- Rebates and Incentives
- Special Financing Offers

### Treatment Element Value Examples

- Characters: Y (Yes) / N (No) (for example - *Item inclusion in Assortment*)
- Numbers: 10, 20, etc. (for example - *offer discount*)
- Descriptors: Max25 (Maximum of 25) (for example – *key message elements for marketing programs*)

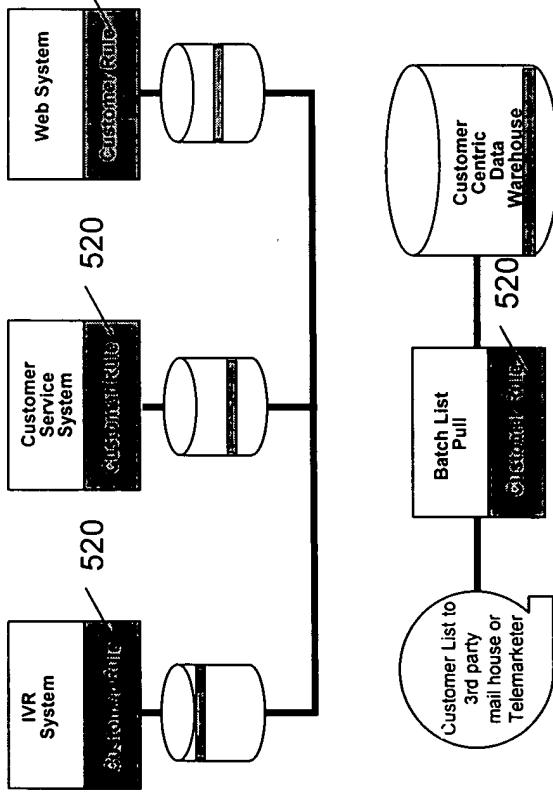
### Example Treatment Elements

- Offer Code
- Campaign Identifier
- Content Management Identifier

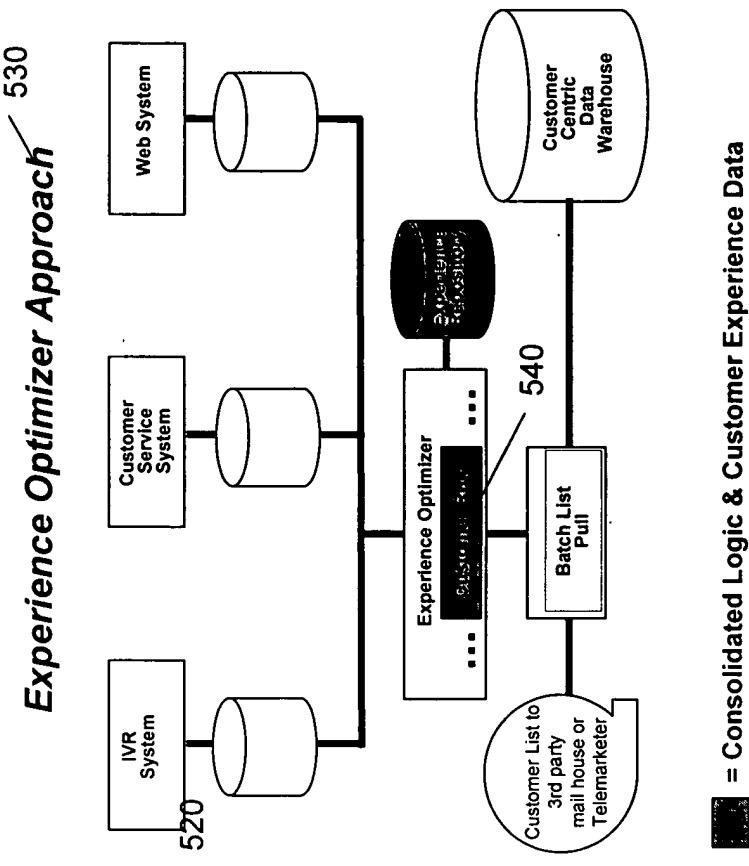
**Figure 4 Example Treatment Taxonomy**

**Example Treatment Rule:** "If a customer in the Loyal Core segment has an attrition score higher than 90, then deliver Gratitude Message and offer Platinum Service Plan at no charge

### Traditional Approach



### Experience Optimizer Approach



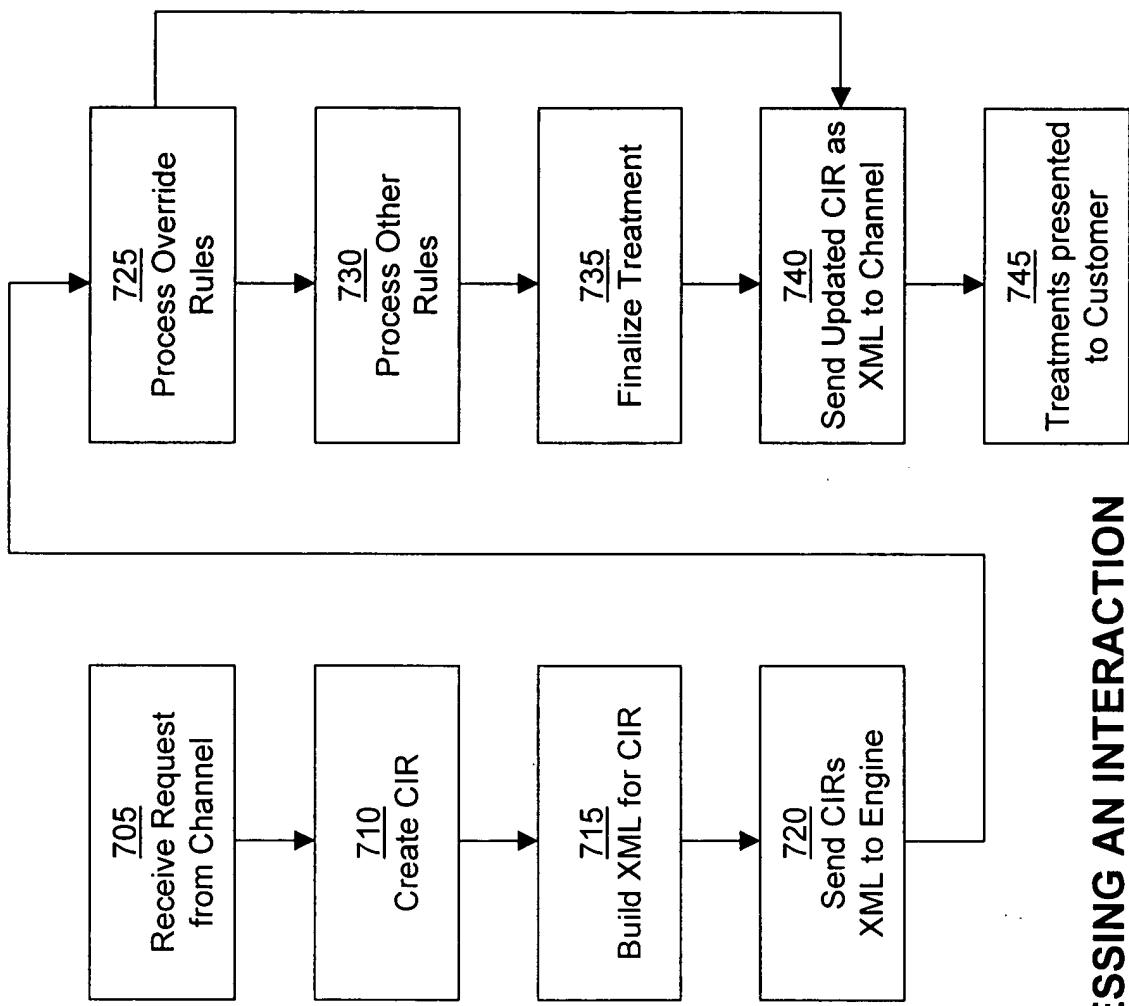
■ = Redundant Logic & Customer Data

■ = Consolidated Logic & Customer Experience Data

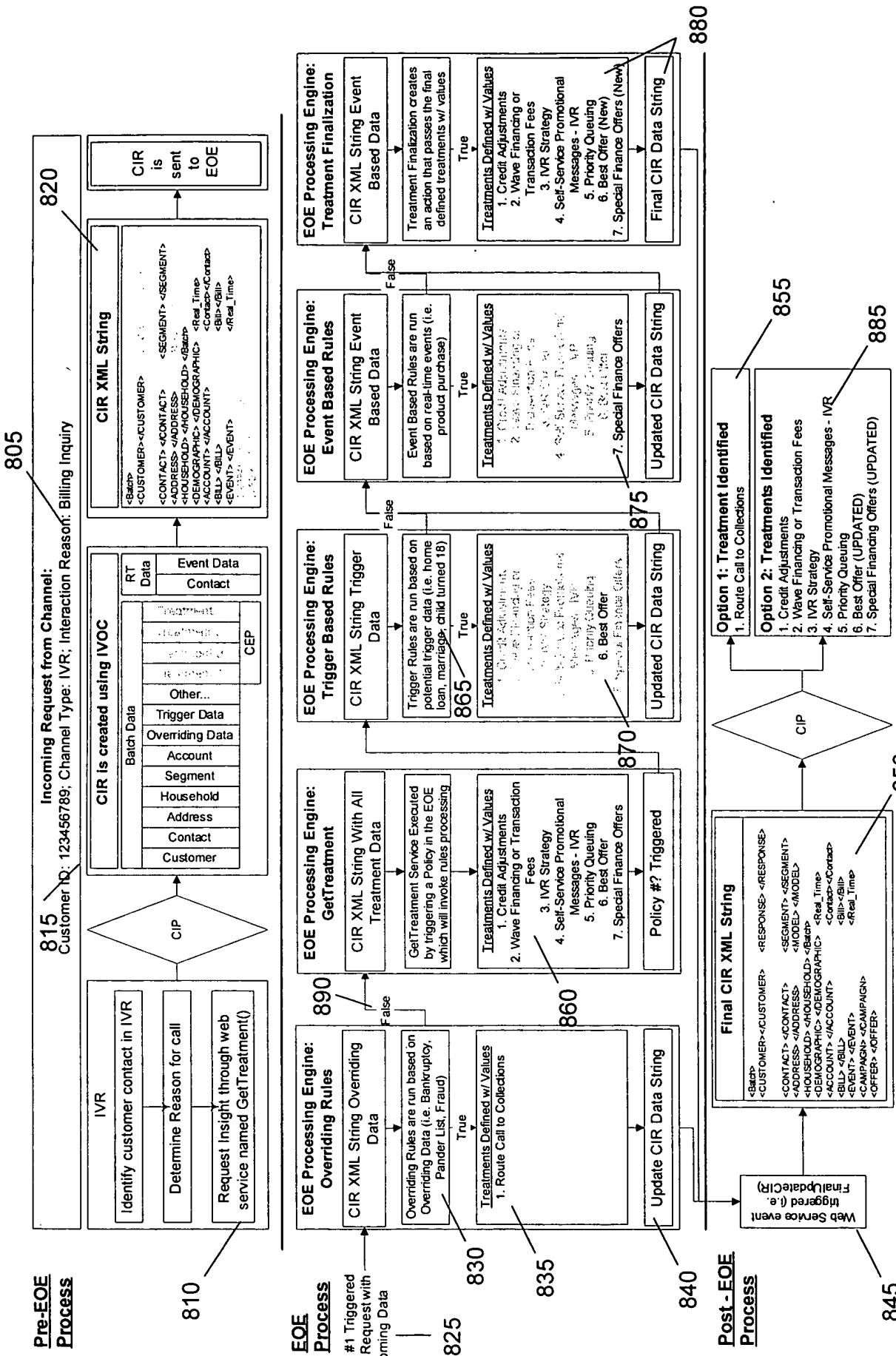
**Figure 5 EO Consolidated Architecture Approach**

<p><b>1. Overriding Rules</b> / 610</p> <p>Rules governed by various federal laws, company policies or by credit/ risk related attributes of customers. These rules are basically applied to the whole population and global in nature. Each customer has to conform to these rules before other rules kicked off and processing starts.</p> <p><u>Examples</u></p> <ol style="list-style-type: none"> <li>1. All pander files (Do not call, No telemarketing, No communication from company etc. internal or external)</li> <li>2. Credit Rating (bad credit history)</li> <li>3. Bankruptcy (customer has filed for bankruptcy cover)</li> <li>4. Fraud/ Delinquent Customers</li> </ol>	<p><b>2. Trigger Rules</b> / 620</p> <p>Rules triggered based on a change/ event in lifecycle of the customer. These events are not behavioral events and generally occur over a period of time. These events provide a good opportunities to convert into a product and service sale.</p> <p><u>Examples</u></p> <ol style="list-style-type: none"> <li>1. Change in address</li> <li>2. Marriage</li> <li>3. Customer Opening his/ her own business</li> <li>4. Home Loan</li> </ol>
<p><b>3. Event Based Rules</b> / 630</p> <p>Rules kicked off after a service provider related event take place. These events are behavioral events and generally occur periodically during the relationship between a customer and an organization.</p> <p><u>Examples</u></p> <ol style="list-style-type: none"> <li>1. Customer is looking for some additional products</li> <li>2. Customer looks for add-on components with the existing services/ product he is enjoying</li> <li>3. Customer just purchased a new service/product</li> <li>4. Customer shows some kind of unhappiness with the current product/ service</li> </ol>	<p><b>4. Interaction Rules (CEW Rules)</b> / 640</p> <p>Rules executed through the absence of previous processing categories. These may be behavioral cues and can be observed during the customer's relationship with the organization. These cues are usually mature in nature and can be determined through analytics, intelligence, or predetermined company rules</p> <p><u>Examples</u></p> <ol style="list-style-type: none"> <li>1. Behavioral change in usage pattern</li> <li>2. Natural upward product/ service migration</li> <li>3. People of same profile migrating to new or add-on</li> <li>4. CEW stated treatment data</li> </ol>

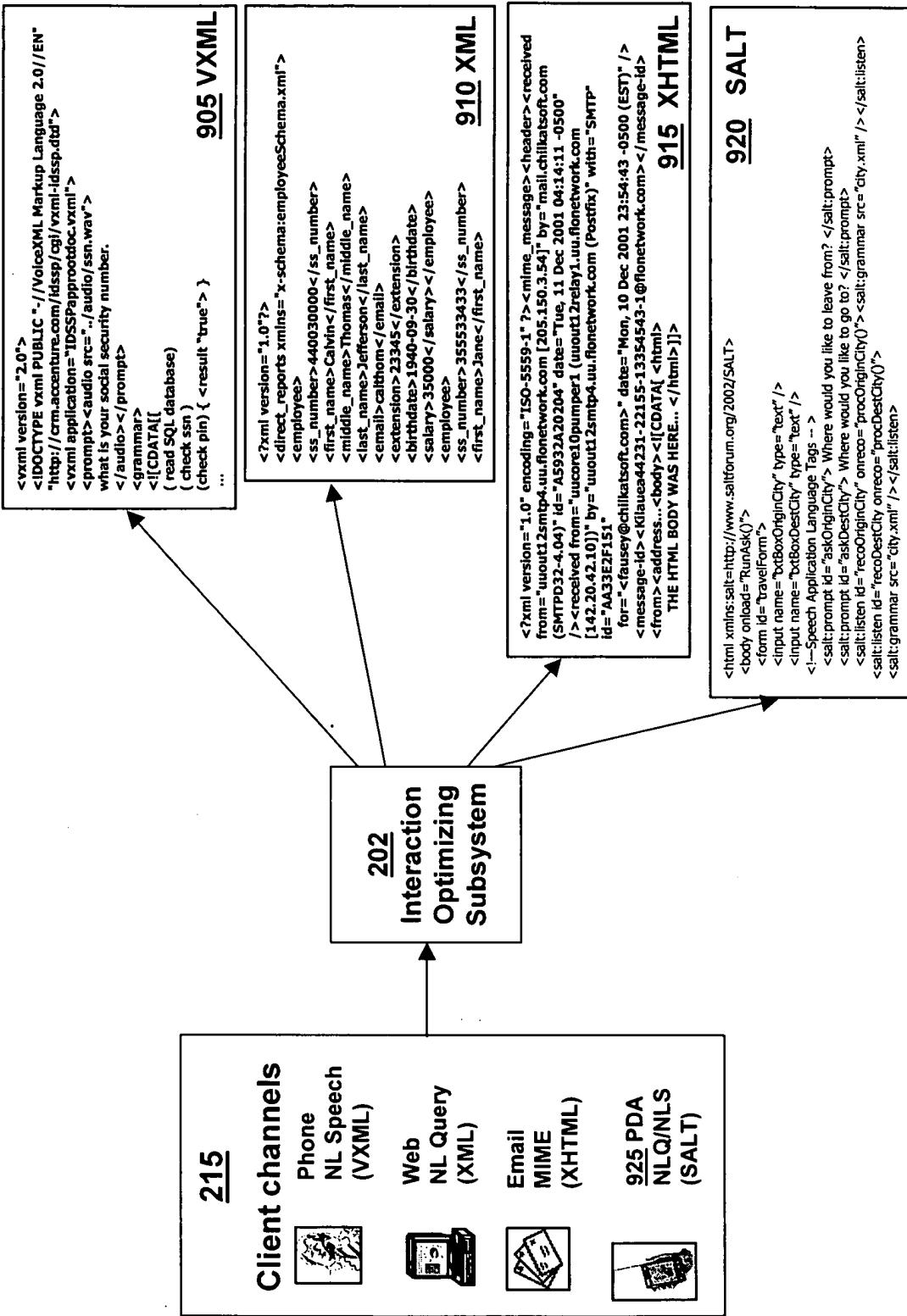
**Figure 6 Rules Processing and Categorization**



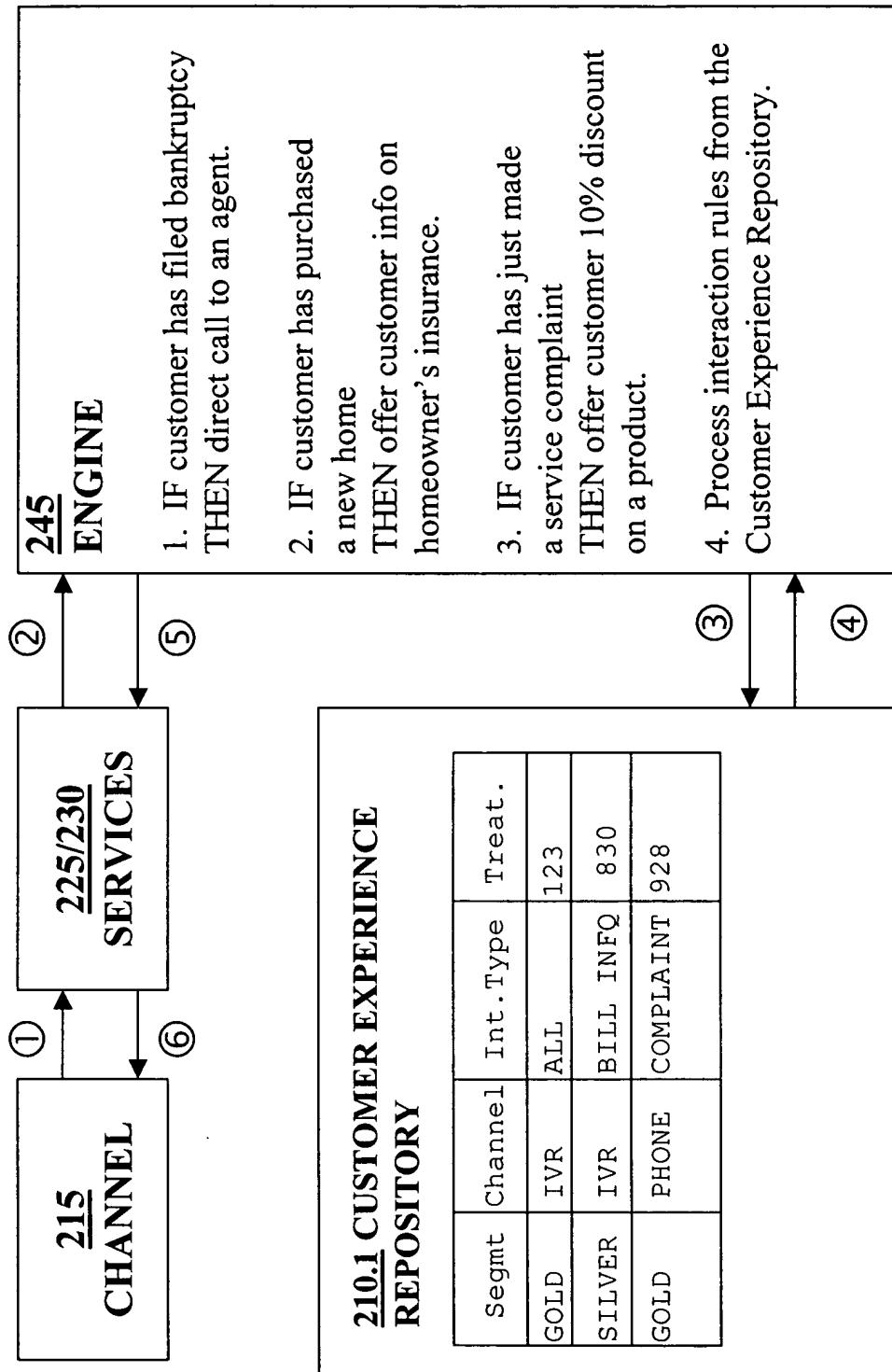
**Figure 7 PROCESSING AN INTERACTION**



**Figure 8** Engine Execution Process



**Figure 9 Example Channel-Specific Code Generation**



**Figure 10**